



***June 1, 2020***

**To:** Regional Planning and Highways Committee

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Consultant Selection for On-Call Right-of-Way Support Services for Capital Improvement Projects

***Overview***

On December 9, 2019, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals to procure a consultant to provide on-call right-of-way support services for capital improvement projects. Board of Directors' approval is requested for the selection of a firm to perform the required work.

***Recommendations***

- A. Approve the selection of Epic Land Solutions, Inc., as the firm to provide on-call right-of-way support services for capital improvement projects.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1613 between the Orange County Transportation Authority and Epic Land Solutions, Inc., in the amount of \$3,500,000, for an initial term of three years, with two, one-year option terms to provide on-call right-of-way support services for capital improvement projects.

***Discussion***

The Orange County Transportation Authority (OCTA) is seeking an experienced consulting firm to perform right-of-way (ROW) support services for public transportation projects involving roadways, highways, freeways, railroad corridors, commuter rail, transit services, OCTA-owned facilities, and land conservation for environmental mitigation on an as-needed basis. These services include various disciplines such as ROW acquisition and negotiation, relocation assistance, utility coordination, title and escrow, environmental site assessment, mitigation studies, lease preparation and negotiation, market surveys, and property management services, as well as expert witness testimony.

ROW services will be needed to support current and future projects in OCTA's Capital Programs Division and to support Next 10 Delivery Plan freeway projects where the California Department of Transportation (Caltrans) is the lead implementing agency for the ROW phase, in addition to those projects for which OCTA is the lead agency for the ROW phase. Large-scale ROW projects with complex scopes and longer terms may be procured under separate procurements specific to each project.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal, considering such factors as qualifications, prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On December 9, 2019, the Board authorized the release of Request for Proposals (RFP) 9-1613 which was issued electronically on CAMM NET. The project was advertised on December 9 and December 16, 2019, in a newspaper of general circulation. A pre-proposal conference was held on December 19, 2019, with ten attendees representing seven firms. Three addenda were issued to make available the pre-proposal conference presentation and registration sheets, provide responses to questions, and handle administrative issues related to the RFP.

On January 21, 2020, eight proposals were received. An evaluation committee consisting of staff from OCTA's Contracts Administration and Materials Management, Real Property, and Rail Program departments, and a representative from Caltrans met to review all proposals submitted. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of Firm            | 30 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan                         | 20 percent |
| • Cost and Price                    | 20 percent |

The evaluation criteria are consistent with weightings developed for similar professional and technical services procurements. In developing the criteria weights, staff assigned the greatest importance to qualifications and staffing and project organization of the firm. The qualifications of the firm are important because a firm's corporate experience in a broad range of ROW functions is essential to the effective performance of services. Staffing and project organization is important as the qualifications and experience of the staff in each

of the technical disciplines is critical to the success of the overall intent of the project to provide comprehensive ROW support services. The work plan criterion was weighted lower as the task orders assigned will define the specific scope of work and to review the firm's understanding of the potential projects and challenges in performing the required work. The cost and price were reviewed to ensure competitive pricing and that OCTA receives value for the work provided.

The evaluation committee reviewed and discussed all proposals received based upon the evaluation criteria and short-listed the three most qualified firms to be interviewed, listed below in alphabetical order:

Firm and Location

Epic Land Solutions, Inc. (Epic)  
Torrance, California

HDR Engineering, Inc. (HDR)  
Irvine, California

Interwest Consulting Group (ICG)  
Rancho Santa Margarita, California

On April 3, 2020, the evaluation committee interviewed the three firms via Skype video conference. The interviews consisted of a presentation allowing each firm to present its qualifications, highlight its proposal, and respond to evaluation committee questions. Questions were asked relative to the firms' experience with various types of ROW support services and complexities of past projects, quality assurance and quality control processes, availability and adequacy of staff resources, and approach to the scope of work, with focus on procedural understanding of both OCTA and Caltrans policies and requirements. Each firm was also asked specific questions pertaining to its proposal. The evaluation committee adjusted the final proposal scores for all three firms as a result of the interviews; however, Epic remained the top-ranked firm with the highest cumulative score and most qualified to deliver the work.

Based on the evaluation of written proposals, information obtained from the interviews, and cost and price, staff recommends Epic as the firm to provide on-call ROW support services for capital improvement projects. The team proposed by Epic includes qualified key personnel staff and subconsultants that have prior experience with public agencies and are familiar with Caltrans requirements. The firm demonstrated a sound and thorough understanding of the scope of work and is capable of supporting OCTA's needs. The following is a brief summary of proposal evaluation results.

#### Qualifications of Firm

Epic was established in 2000 and is a full-service ROW and real property management firm that demonstrated appropriate qualifications and relevant experience in the type of services required by the scope of work. The firm has prior experience working with OCTA and is knowledgeable about OCTA and Caltrans ROW requirements. Epic's previous experience in providing public sector ROW support services in Orange County and throughout California includes OCTA's 17<sup>th</sup> Street Grade Separation Alternatives Assessment and Interstate 5 Improvement from North of Interstate 405 to State Route 55, Los Angeles County Metropolitan Transportation Authority (LA Metro) State Route 710 Sound Wall, Riverside County Transportation Commission Real Estate Acquisition Management Plan-91/Perris Valley Line, and State of California High-Speed Rail Environmental Site Assessments, Burbank to Anaheim segment. Epic has well-established project experience with nine of the 13 proposed subconsultants to support various disciplines of work.

ICG is an experienced ROW services consultant that was established in Orange County in 2002. The firm's ROW experience includes several widening and grade separation projects with various municipalities and agencies throughout California that includes City of Brea State Route 57 Lambert Road Interchange Project, City of Santa Ana Bristol Street Widening Project, City of Modesto State Route 132 West Freeway/Expressway Project, and OCTA Tustin/Rose Grade Separation Project. ICG has well-established relationships with several of its proposed subconsultants.

HDR has 45 years of experience in Southern California and currently provides ROW services as part of the current bench of ROW contracts for OCTA. HDR and its proposed list of experienced subconsultants demonstrated relevant ROW knowledge and experience with OCTA and other agencies throughout Orange County that includes OCTA's State Route 55 Improvement Project and Regional Rail Program Management Consultant Services, San Gabriel Valley Council of Governments Montebello Grade Separation Project, and LA Metro Union Station Link Technical Project.

#### Staffing and Project Organization

Epic's proposed key personnel have relevant experience as well as the professional credentials needed to ensure effective project management and execution required for the scope of work. The proposed multi-disciplinary staff and subconsultants have expertise in all aspects of the required ROW services, including acquisition and negotiation, relocation assistance, utility coordination, and property management which make up a majority of the project scope. The proposed project manager has 11 years of ROW experience

with both public and private companies in transportation, housing and utility projects, as well as ROW experience with Caltrans procedures, Federal Highway Administration (FHWA), and Federal Transit Administration (FTA)-funded projects. The proposed ROW acquisition lead, utility coordination lead, relocation assistance lead, and project development lead each has over ten years ROW experience with Caltrans processes and FHWA-funded projects. All key personnel have indicated appropriate levels of availability to OCTA as other existing projects are in the final stages of completion. Epic submitted a comprehensive organizational chart that clearly identified the responsibilities of each team member. Epic's proposed key staff participated in the interview process which validated qualifications and experience.

ICG's proposed key personnel have relevant ROW experience and appropriate certifications that includes a designated quality manager. The proposed project manager has over 25 years of ROW experience with all other key personnel each having over ten years' industry experience. ICG provided detailed organizational and project responsibility charts that also identified each team member's project availability. All of ICG's proposed key personnel participated in the interview process.

HDR's proposed key personnel and subconsultants have extensive experience and demonstrated ROW knowledge of prior OCTA contract task order and Caltrans procedures. The proposed project manager has 18 years of industry experience. The proposed document controls lead, several ROW agents, and the utility coordinator have over 15 years industry experience combined. All of the proposed subconsultants have experience with HDR on past and current ROW projects. All of HDR's proposed key personnel participated in the interview process.

### **Work Plan**

Epic's work plan addressed all the requirements of the scope of work identified in the RFP. The work plan presented a sound understanding of the requirements to provide the various disciplines of the ROW support services for OCTA's projects. The firm provided a detailed work plan that addressed all of the tasks in the scope of work with clear descriptions and an organized task allocation table. Epic proposed two proprietary web-based mobile tools, ArcGIS, that will be utilized for parcel mapping, cost estimation and property and project management, and Epic Project Manager for acquisition file management. Epic demonstrated an understanding of OCTA policies and procedures and the various Caltrans procedures and requirements to deliver ROW support services.

ICG's work plan also provided a detailed breakdown for each task that demonstrated a clear understanding of the scope of work. ICG's proposal demonstrated its knowledge of the activities and deliverables that are required to fulfill the requirements of the scope of work, including all Caltrans requirements. ICG will utilize MS Project for project monitoring and schedule control in addition to commercially available Sanborn Maps and United States Geological Survey Topographic Maps for historical land-use analysis.

HDR proposed a well-developed work plan approach that addressed all elements of the scope of work that demonstrated a clear understanding of OCTA and Caltrans ROW policies and procedures. The work plan included a comprehensive project management plan with the use of ROW tools, such as MS Project and Primavera P6, to monitor project schedules and budgets, KMZ Files for detailed parcel information, and ProjectWise for document control.

#### **Cost and Price**

Cost was weighted 20 percent of the overall score. All firms submitted labor pricing for type of work identified in the scope of work for the entire term of the contract. Pricing scores were based on a formula which assigned the highest score to the lowest proposed average weighted hourly rates, and scored the remaining average weighted hourly rates in relation to the lowest proposed average weighted hourly rates. The firms' average weighted hourly rates ranged from \$111 to \$146. Epic's calculated weighted hourly rate of \$127 is considered fair and reasonable in comparison to the independent cost estimate of \$137.

#### **Procurement Summary**

Based on the evaluation of the written proposals, the team's qualifications, information obtained during the interviews, and cost and price, the evaluation committee recommends award of contract to Epic. The recommended firm has the required experience in ROW support services and is capable of meeting the requirements of the RFP. The team included qualified staff and subconsultants that have prior experience in providing ROW support services to public agencies. The selected firm demonstrated a comprehensive understanding of the scope of work and has the capacity to support OCTA's project needs.

#### **Fiscal Impact**

Funding for this project is included in OCTA's Fiscal Year 2020-21 Budget, Capital Programs Division, Account 0017-7514-M0201-F17, and utilizes a combination of FHWA, FTA, and Measure M2 funds.

***Summary***

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Agreement No. C-9-1613 with Epic Land Solutions, Inc., in the amount of \$3,500,000, as the firm to provide on-call right-of-way support services, for a three-year initial term, with two, one-year option terms.

***Attachments***

- A. Review of Proposals, RFP 9-1613 On-Call Right-of-Way Support Services for Capital Improvement Projects
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 9-1613 On-Call Right-of-Way Support Services for Capital Improvement Projects
- C. Contract History for the Past Two Years, RFP 9-1613 On-Call Right-of-Way Support Services for Capital Improvement Projects

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